

Simple Action Plan Template Example

Project Name	Start Date
Spring Donor Engagement Event	February 3, 2025
Project Manager	End Date
Henry McNeal	April 5, 2025

Goal

Plan a fundraising event for May 10, 2025, to engage key donors for the new wing.

Action Steps	Assigned Person / Team	Priority Level	Status	Resources	Due Date	Notes
Confirm event theme and location	Events Team	High	Complete	Venue database, event calendar	10-Feb	Selected rooftop gallery space with panoramic views
Develop invitation list	Development Team	High	Complete	Donor CRM, board referrals	14-Feb	Include top 50 major donors and 20 new prospects
Design and send invitations	Marketing Team	Medium	In Progress	Graphic designer, email software	28-Feb	Invitations will include link to RSVP + donation options
Coordinate catering and entertainment	Events Team	Medium	Not Started	Preferred vendors list	15-Mar	Considering live jazz trio and local catering partner
Prepare talking points for staff and board	Development Director	Medium	Not Started	Campaign case statement	25-Mar	Tailor to emphasize impact of new wing
Confirm RSVP list and send reminders	Development Assistant	High	Not Started	RSVP software	5-Apr	Use scheduled email and follow-up calls